

USAWOA Chapters Operational Guide



USAWOA PAM 300-1

Dated: 1 October 2025



THE QUIET PROFESSIONAL
2018 Commemorative Edition
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Introduction

Not unlike any other office in the USAWOA, being a good Chapter Official is not an easy task. Having said this, it is best described as a “labor of love,” and when executed well, is as personally rewarding, as it is crucial. It is noted that the Chapter Presidents are our leaders at the grassroots level of the Association.

Moreover, you are the keys to the three core missions of our association, as emblazoned in our logo: “Professionalism, Representation, and Recognition.” You execute these missions by representing our Cohort in scores of communities, around the globe.

You are also our most valuable asset in ensuring a productive recruitment and retention effort. Membership dues are the financial lifeblood of this association, and increased membership gives us a more powerful voice in our national-level mission of Representation with the Army leadership, the White House, and on Capitol Hill.

This is the package sent to all new Chapter Officials. You, and your leadership team should read this and use it as a reference as you execute your crucial work. Just as importantly, be prepared to discuss its contents with your replacements in detail, to ensure he or she understands its contents. It contains information on subjects such as:

- Accomplishments of the USAWOA (“what have we done for you”) – Important Recruiting and Retention Tool
- Important tips on successfully conducting Chapter meetings
- Tips on producing successful Chapter minutes (and the importance of properly filing them with National HQ, for longevity and rebates)
- What to do if your unit is deployed
- Abbreviated version of Robert’s Rules
- Monthly Presidents Reports

**Chapter “Quick-Start” Guide:
(Important Excerpts from USAWOAM 300-1 [Operations Manual])**

300-1, Section 1, Chapter II para 4: Any five (5) members can petition with the National Board of Directors (BOD) through the Region Director to form a chapter. The purpose of forming a chapter is to provide a local forum for members to discuss problems its members may have in carrying out the purposes of the Association, make recommendations, and among other events carry out such civic and charitable purposes as the chapter member’s desire.

(Excerpt from USAWOAM 300-1 (Operations Manual) Chapter III

Duties of Officers:

a) Chapter President: The President shall preside over all Chapter meetings; carry out the mandates of the Chapter, enforce the provisions of the Chapter Bylaws and the Articles of Incorporation and Bylaws of USAWOA. In addition, he/she shall represent the Chapter in all matters pertaining to its affairs. He/she shall appoint all committees and will be an ex-officio member of all committees except the nominating committee. The following is a "personal message" to Chapter Presidents:

1. You did not accept the invitation to serve as President just for the sake of being President. Your selection came as the result of recognition of leadership abilities, a record of accomplishment and demonstrated interest in serving your chapter. If you are typical, you would like to move your chapter and its members a few steps ahead, on a path you feel is important, during your term in office. First, there is a need to identify what you want to accomplish early. Consider these few suggestions:
2. Take time to reflect on a few of the most compelling needs and the most earnestly sought objectives confronting your chapter. Get your own thoughts in order, creatively and constructively, and identify and refine a few underlying convictions which have real meaning to you, and which have an apparent potential for accomplishment.
3. Create the opportunity and atmosphere for a solid, meaningful exchange of ideas and convictions with your chapter officers, away from the telephone and interruptions of daily routine. Please share your own conclusions with them and absorb what they have to say. These are the first tangible steps toward building an eventful year ahead.
4. Please recognize that you cannot DO IT ALL. There is never enough of the all-important resource of time, money, and

member involvement, regardless of how fine your chapter, how capable the executive council is, or how sound its finances. The most significant part of your chapter's program in the year ahead will be continuity of established activities, meeting needs as they arise and contending with patterns of change. Streamline and tighten down those original and tentative objectives to a manageable few, recognizing the fallacy of attempting to juggle too many balls at the risk of dropping them all. Beware of the temptation to change course overnight unless there is a commonly recognized immediate danger.

5. Your role from this point is not for us to suggest or advocate. Your chapter has a pattern, a personality, a structure, and traditions of its own. Your forte may be in front of a microphone, or it may be in earnest and convincing discussion behind the scenes.
6. In your public and internal communications, you may write your own scripts for columns, or they may be scripted by your committee chairpersons. You may work out a technique to do it together in consultation. Regardless of who takes the lead; do not overlook pitching the bouquets, the deserved compliments, and the morale building recognition wherever it is earned. It is a vital role of a Chapter President and pays dividends many times over.
7. One crucial responsibility which you have is to personally answer criticisms regarding the policy or performance of the association.
8. However, you serve as President, it is bound to be a rewarding experience and advance planning will have played a vital part in your success. Incidentally, it will not be a perfect term of office, but it will be interesting, exhilarating, informative and unforgettable. As President, you will learn more about people and human nature, thoughtfulness, hospitality, kindness, and dedication and, on rare occasions, just the opposite. Please take it in stride, do not be a worrier or a pessimist. Take inventory as the year goes on to see if your fellow Warrants detect a change in your personality for better or worse. If you catch your jaw jutting out a little further, your stride lengthening, or your responses getting a little lengthier and more positive before a microphone, it may be all to the good; or you may be contracting "president-itis," a dreaded disease that has befallen many an elected official.

- b) Chapter Vice President: The Chapter Vice President shall act as a representative of the President on all matters referred by the President. The Chapter VP should fill in for the Chapter President in his/her absence; hold meetings, represent the Chapter at functions, etc. if needed. He/she shall, at the request of or in the absence of the President, preside over Chapter meetings. The Vice President shall be the General Committee Chairman and as such be a member of each committee. The Chapter Vice President, at the direction of the President, may hold responsibility for chapter membership to help members stay current and increase Chapter membership.
- c) The Chapter Secretary: The Chapter Secretary is one of the most critical positions in the Chapter. Although the duties are briefly explained in the Bylaws, it is deemed essential to expand further on these responsibilities since this position is so critical.
1. The Secretary is a significant link between the Chapter and the Region and National Headquarters. The Secretary is responsible for presenting communications to the Chapter for appropriate action and keeping Headquarters and the Regional Director informed on chapter activities.
 2. The Secretary prepares and distributes notices about the Chapter general membership meetings, prepares (after consultation with the Chapter President) the agenda to be covered, maintains a record of attendance, and prepares the minutes of meetings. The preparation of comprehensive and well-written chapter minutes is most important. Review of the information contained in the minutes allows the National Headquarters to determine the activities of the Chapter. Minutes should discuss the Chapter's professional development activities, community benefits activities, charitable donations, etc. Is responsible for the maintenance of an up-to-date record of the names and addresses of all Chapter members and for notifying Region and USAWOA Headquarters of any changes.
 3. The Chapter Secretary shall be charged with keeping all administrative records, minutes of meetings, distribution of literature and notices, and such other duties as prescribed by the President. The Chapter Secretary should send in the minutes for all meetings to USAWOA Headquarters AND the Regional Director.
 4. The Chapter Secretary is responsible for maintaining and updating the Chapter rosters on a regular basis and ensuring Chapter Members proxies are on hand for the chapter meetings. The Chapter Secretary is responsible for notifying the Regional Director and the National Headquarters of any change of Chapter officials by using USAWOAF 300-5. The Chapter

Secretary shall supervise the Chapter Historian. If no Historian these duties fall under the Secretary.

- d) The Chapter Treasurer: Shall receive and disburse the funds from the Chapter's non-interest bearing account and keep and preserve an accurate accounting of all expenditures, donations and income. The account shall be open to inspection by the Chapter Members and subject to audits at any time by an Auditing Committee duly appointed by the Chapter President.

Upon approval of the Chapter Members, the Treasurer will pay bills as needed. The will present a financial report at every meeting of the General Membership to the Chapter Secretary for recording in the meeting's minutes that will be forwarded to their Region and USAWOA Headquarters. The Chapter Treasurer shall be charged with the financial records of the Chapter. They shall be responsible for prompt payment of all Chapter obligations from Chapter funds. They shall comply with the financial instructions of the National Headquarters and will be bonded in an amount established by the National Headquarters of USAWOA. Anyone authorized to sign checks should be bonded, not just the Chapter Treasurer. The Chapter Treasurer shall serve as, or supervise, the Property Custodian.

- e) The Chapter Historian (if appointed): The Chapter Historian shall compile or cause to be compiled annually, from the Chapter records and other authentic sources, a narrative history of the Chapter as well as its activities and accomplishments. They shall be the custodian of the Chapter Charter and such other historical records and documents belonging to the Chapter.
- f) Chapter Webmaster. USAWOA provides, free of charge, a webhosting service for the chapter to utilize as their website (<https://usawoa.org/about/regions.html>). If the Chapter chooses to utilize a commercially available webhosting service, for their website, there should be a dedicated webmaster to ensure the site is maintained and updated at all times.
- g) Members elected to offices within the Chapter cannot hold any other elected office within the structure of USAWOA.

Important Chapter Information Concerning Meetings

- a) MEETING TIME AND LOCATION: It is difficult to find one perfect meeting time or place. However, Chapter leaders should seek to accommodate the majority of Members that are "regulars" at their meetings. However, it is beneficial to ***periodically change meeting time and location***. Several times a year, has proven to be highly successful Chapters set up a special meeting. They arrange

for a guest speaker that will interest a diverse group, for example, the commissary manager; TRICARE official; state veterans' service coordinator; military museum curator, etc. They should widely advertise this meeting. Often, they invite spouses, serve pizza, and even provide childcare. Experience shows that at such special meetings, you will get not only an excellent showing of your regular Members, but also other warrants that do not attend your regularly scheduled meetings, which could increase Chapter membership.

- b) We also encourage the use of virtual meetings such as MS Teams or Zoom. This allows members who may not be able to make an in-person meeting to participate via their phone or computer.
- c) MEETING CONDUCT AND CONTENT: USAWOA Members expect and deserve organized, professionally conducted Chapter meetings. ***The enclosed Robert's Rules pamphlet will help.*** Chapter meetings must provide value to the Members; they want to learn something, not just hear "how it was," war stories or gossip. A good practice might be to bring the latest *Newsliner* to your meeting and discuss current events from articles, and Chapter activity ideas gleaned from the Chapter News section. As a Chapter president, you must guide discussion in a productive manner; yet not stifle expression of opinions or ideas. Mastering this skill pays dividends!
- d) MANAGEMENT OF YOUR MEMBERSHIP: One of the biggest challenges Chapter leaders have is keeping updated membership rosters with current contact data. With the implementation of our new Association Management System, YourMembership (<https://usawoa.site-ym.com>), Chapter leaders can now download current rosters of all assigned members any time they want. In addition to being a helpful tool to take attendance, the roster can be sorted to identify those members whose membership is about to expire. Using these tools religiously will help Chapter Presidents in managing and expanding legitimate Chapter membership. Maintenance includes but is not limited to mailing addresses, email addresses, and members phone numbers. The Chapter President/Secretary can also post the meeting location(s). This is the preferred method to manage the chapters membership. ALL chapters can access this information using their assigned @usawoa.org email address. Contact the membership manager (hq@usawoa.org) for assistance
- e) HQ USAWOA provides all chapters with a unique email address (@usawoa.org) to be used for official USAWOA business. It is strongly encouraged that chapters DO NOT use personal or government issued (@army.mil) email accounts.
- f) CHAPTER PUBLICITY: Most installations and communities have a "military" website. Contact the individual responsible for managing the website information to learn what's needed to publicize Chapter meetings and events. Send them material and photos about Chapter activities and individual achievements; "toot

the Chapters horn." The publicity will gain Chapter Members and appreciation within the community.

- g) MINUTES OF CHAPTER MEETINGS: A copy of the minutes of Chapter meetings *must be submitted* to the USAWOA HQ (hq@usawoa.org) and a copy to the Regional Director. There are several reasons for this:
1. USAWOA incorporation documents require we retain copies of Chapter minutes.
 2. Minutes are proof of a meeting. One meeting per calendar quarter qualifies a Chapter to receive a rebate of a portion of Members' dues. (See "Rebates," below.)
 3. The Awards Committee reviews minutes to determine winners of national level awards. Make sure to annotate any activities completed or funds actually spent.
 4. A Chapter meeting must be documented every quarter, to qualify the Chapter for longevity awards (such as 10, 20-, 30-, 40-, and 50-year streamers and eventual "Silver Chapter" status or "Gold Chapter").
 5. It is important to know that minutes *do not* need to be "approved" before they can be submitted. As soon as written, minutes can, and should, be submitted to the HQ and Regional Director by mail, or email.
 6. If a Chapter meeting is scheduled and you do not have enough Members present to have a quorum, a Memorandum for Record can be submitted in the absence of formal minutes. The receipt of such an MFR qualifies the Chapter for a rebate.
 - a. This is also the appropriate time to use proxy's.
- h) REBATE POLICY AND PROCEDURES: A portion of each Chapter Member's dues is returned to the Chapter in the form of a Rebate. Checks are issued in January, for the previous calendar year. *Please deposit the checks promptly. The checks are valid for 90 days. Checks will not be "re-issued."*
- i) MAJOR DEPLOYMENTS OR UNIT TRAINING: Major unit deployments or field training often makes it difficult for a Chapter to meet. In these cases, any Chapter officer may write or email to advise the HQ of the situation. *The Executive Committee has the authority to grant a waiver to the "minutes for rebate qualification rule" for a short period (usually six months).* This action allows the Chapter to continue to receive a rebate even though the deployment or major training exercise prevents the Chapter from holding meetings and keeps the Chapter eligible for continuing Longevity Awards.

- j) MEMBERSHIP DUES AND APPLICATION FORM: USAWOA National Bylaws state that Chapters cannot charge "Chapter" dues. This is the reason why we have a rebate policy. All memberships and renewals are completed online at <https://usawoa.org/membership/membership.html>.

Monthly President's Package

- a) PRESIDENT'S PACKAGE: An email will be sent each month to all members containing a message from the USAWOA National President. The Association President writes about "broad-spectrum" topics of importance to the Association membership and the Cohort.
- b) Successful Chapters contact each new arrival and/or new Members to welcome them to the area and the Chapter. Many Chapters use a committee or volunteer individuals to make these first contacts. ***Personal contact is particularly important in the case of WO1 Members.*** A Chapter can help recently appointed warrant officers get off on the right foot. In addition, you can get these new Members involved in the activities and operations of your Chapter.
- c) The importance of contacting new Chapter Members cannot be over emphasized, particularly "first-time" Members. Renewal statistics prove that more than 60% of our regular, ongoing Members renew. However, the renewal percentage of our "first-time" WO1 Members is ***less than 18%*** and other (CW2-5) "first-time" Members is about 40%. This shows that we ***attract*** new Members but fail to ***keep*** them. You can help by placing emphasis in this area, and following up on the reports discussed the paragraph below.

RENEWAL POLICY AND PROCESS

- a) RENEWAL POLICY AND PROCESS: Members automatically receive renewal emails at 60, 30 and 7 days before their membership is set to expire. If no renewal is received by the first week of the month of expiration, we also mail the first of two paper notifications, which have the renewal application printed on the back side of the letter. The second (final) notification is sent out by mail 7 days prior to making the Member's record inactive. 30 days after the Member's membership has expired the record is made inactive. This action often results in some "oh my-gosh" on-line or telephone renewals.
- b) "AUTOMATIC" RENEWALS: Several hundred Members have this option and find it helpful during PCS and/or deployments. ***This is a good program to encourage,*** because it helps to retain Members. By doing this, the member authorizes us to charge annual dues to this account. Members should contact the

membership manager (hq@usawoa.org) or bookkeeper (finance@usawoa.org) to utilize this option.

- c) NEWSLINER MAGAZINE: For special Chapter events, HQ can provide limited quantities of back editions of the *Newsliner*, and other support. Advance coordination is required to allow the most economical mailing/shipping rates.
- d) CHAPTER RECRUITING DRIVES: Successful Chapters hold periodic membership drives (typically of about 90 to 180 days). We can send you recruiting materials and/or make memorabilia available at reduced rates for incentives. ***In some cases, Chapters will reduce the membership fee and make up the difference from Chapter funds.*** We'll be glad to discuss this topic with you further.

NEWSLINER

- a) Newsliner SUBMISSIONS: Chapters are encouraged to submit "Chapter News" items for publication in the *Newsliner* magazine. Generally, these are in the form of a picture taken at a recent Chapter event. If a Member has a compelling article for publication, we will also gladly consider it for publication. When submitting "Chapter News" items, please ensure that all picture files are of highest resolution possible (we cannot use poor-quality photos, pasted into presentation or word documents). Please also include a suggested caption, listing a description of the event, the location, the date, and name and rank/title of persons depicted (left to right).
- b) RECOGNITION OF ACHIEVEMENT: The HQ has two types of certificates, one for "***Appreciation***" and the second for "***Academic Achievement***." Upon request, we will complete and sign appreciation certificates and mail them to you. If your Chapter is located at an installation where Warrant Officer training is conducted, *you are strongly encouraged* to link-up with the training department and arrange for them to use our academic achievement certificates. We will pre-sign these certificates and mail them in quantity to either a Chapter POC or to the training department.
- c) Many Chapters develop "Chapter-unique" certificates. With the common availability of high-quality printers and special paper, this is easy to do. You are encouraged to do so. For informational purposes, we simply request that you mail us a blank copy of each certificate.

ARMY OFFICIAL OPERATING AUTHORITY

USAWOA is considered a Non-Federal Entity and all activities occurring on a military installation, must comply with Army Regulation 210-22, Support for Non-Federal Entities Authorized to Operate on Department of the Army Installations. The Department of the Army also considers USAWOA to be an approved "National Military Service

Organization." This means that Permissive TDY, or if command approved, Funded TDY, may be used for attendance at our Annual Meeting of the Members. For any clarification of how this may apply to your organization, please contact the USAWOA national headquarters for assistance.

- a) **BANK ACCOUNTS:** Most Chapters have the treasurer as the primary "check-writer." However, it is prudent to have a few other officers with signature authority and for each of them to hold a blank check from the end of your check series. This way, in the absence of your treasurer or checkbook, you will be able to access Chapter funds. ***Your Chapter must have an "Employer Identification Number" (EIN) from the IRS to set up and operate a bank account.*** The Chapter **CANNOT** use the Headquarters EIN and each Chapter must have its own. The Chapter Treasurer will request an EIN. Our web site has instructions on how to complete the form. The EIN will appear on your bank statement. It takes a bit of time to request a Chapter EIN, but it's the right way.
- b) **TAX EXEMPTION:** USAWOA is a 501(c)(19) nonprofit, tax-exempt organization for veterans' organizations recognized by the IRS. This also applies to our Chapters. USAWOA and Chapters ***are not automatically exempt from local sales taxes.*** It is up to each Chapter to determine if the state and/or local jurisdiction grants exemptions to 501c(19) organizations; and, if the action will benefit the Chapter, to apply for such exemption.

MEMORABILIA

- a) **MEMORABILIA:** Most successful Chapters sell memorabilia. Not only does this augment Chapter funds, but it also brings a Chapter together to plan, select, and market memorabilia items. Feel free to use the HQ as a sounding board for your ideas for new memorabilia. We encourage the use of the USAWOA logo on memorabilia items, however that requires the BOD approval.
- b) USAWOA does not grant exclusive "franchises" for items to a Chapter. However, most Chapters cooperate with one another and do not compete by selling the exact same items.

Suspension and Revocation of Charters

- a) IAW 300-1, Section 1, Chapter II, 4g Suspension and Revocation of Charters: The National BOD, as recommended by the Region Headquarters (if one exists), default Regional Director, may revoke the charter of any chapter for just cause: Failing to conduct at least one meeting a quarter, without just cause. Failing to maintain written contact with the Regional and National Headquarters during a calendar quarter. When the majority of the chapter members have voted to request suspension. The charter of any chapter shall automatically be suspended when the number of its membership is less than ten members for a

period of ninety days. Every month the EXCOM members are briefed on those chapters who have not submitted minutes after the mandatory reporting period. At this time the Regional Director is notified of the chapters in danger of being closed and are given adequate time to try and solve the issues and to determine if the chapter is making a valid attempt at maintaining its charter. Only after lengthy discussions does the EXCOM actually recommend to the BOD that a chapter should be closed. Chapters making no attempt or have become inactive are voted for closure.

- b) Actions upon Suspension or Revocation of Charters (300-1, 4g):** Once a chapter has been closed, there are procedures that must be followed to submit all chapter documents to the National Headquarters. Those documents are maintained on file for one year. If the Regional Director or interested member wishes to revitalize the chapter-a chapter “start-up” must be submitted through the Regional Director to the BOD for approval. Refer to 300-1, 4, b for “start-up”
Please remember, we're here to help you be successful. Don't hesitate to call to ask questions or to discuss and test your ideas with us!

Roberts Rules of Order – Simplified

Guiding Principles:

- Everyone has the right to participate in discussion if they wish, before anyone may speak a second time.
- Everyone has the right to know what is going on at all times. Only urgent matters may interrupt a speaker.
- Only one thing (motion) can be discussed at a time.

A **motion** is the topic under discussion (e.g., “I move that we add a coffee break to this meeting”). After being recognized by the president, any member can introduce a motion when no other motion is on the table. A motion requires a second to be considered. If there is not a second, the matter is not considered. Each motion must be disposed of (passed, defeated, tabled, referred to committee, or postponed indefinitely).

How to do things:

You want to bring up a new idea before the group.

After recognition by the president, present your motion. A second is required for the motion to go to the floor for discussion, or consideration.

You want to change some of the wording in a motion under discussion. After recognition by the president, move to amend by

- adding words,
- striking words or
- striking and inserting words.

You want more study and/or investigation given to the idea being

discussed. Move to refer to a committee. Try to be specific as to the charge to the committee.

You want more time personally to study the proposal being discussed. Move to postpone to a definite time or date.

Unanimous Consent:

If a matter is considered relatively minor or opposition is not expected, a call for unanimous consent may be requested. If the request is made by others, the president of the board will repeat the request and then pause for objections. If none are heard, the motion passes.

Quick Reference					
	Must Be Seconded	Open for Discussion	Can be Amended	Vote Count Required to Pass	May Be Reconsidered or Rescinded
Main Motion	√	√	√	Majority	√
Amend Motion	√	√		Majority	√
Kill a Motion	√			Majority	√
Limit Debate	√		√	2/3rds	√
Close Discussion	√			2/3rds	√
Recess	√		√	Majority	
Adjourn (End meeting)	√			Majority	
Refer to Committee	√	√	√	Majority	√
Postpone to a later time	√	√	√	Majority	√
Table	√			Majority	
Postpone Indefinitely	√	√	√	Majority	√

ENCLOSURE #1

Date

1. Call to Order

President presided and called the meeting to order at ____ hours on _____, at _____. A quorum was established with ____ Members Present, ____ Proxies tendered, and ____ guests.

2. Read the Minutes of the Last Meeting (Secretary)

A motion was made by _____ to accept the minutes, seconded by _____, motion carried.

3. Read Treasurer's Report (Treasurer)

The treasurer rendered the report to the chapter members present. The report is on file subject to audit.

Period Covers from One Month to the Next....

Balance forward: \$

Deposits: \$

Expenditures: \$

Funds Available: \$

Savings: \$

4. Announcements: Upcoming Events

5. Officer Reports:

- a. President's Report:
- b. Vice President's Report:
- c. Secretary's Report:
- d. Treasurer's Report:

6. Committee Reports:

- a. Committee 1: The Treasurer:
- b. Committee 2: Upcoming events:
- c. Committee 3: Community Service:

7. **Memorabilia:**

8. **Unfinished Business:**

9. **New Business:**

10. **Professional Development:**

11. **Around the Room**

12. **Adjournment:**

The meeting was adjourned at ____ hours. The next meeting will be _____

Submitted:

Approved:

Chapter Secretary

Chapter President

ENCLOSURE #2

MEMORANDUM FOR EXCEPTION OF MINUTES SUBMISSION

Chapter name & number

Date

MEMORADUM FOR RECORD

SUBJECT: No Chapter meeting.

1. reason for not having official chapter meeting; weather, quorum, up-tempo, no chapter officers, etc.

2. makeup date

3. Point of contact for this memorandum is

Signature block